

How to Use Statewide Contract PRF62 Energy Consulting Services Designated DOER

Contract #: PRF62

Contract Duration: 1/4/2016 to 12/31/2019

MMARS #: PRF62

Options to renew: Two extensions, one year each

Contract Manager: Charles Tuttle - 617-626-1043 charles.tuttle@state.ma.us

This contract contains: Small Business Purchasing Program (SBPP), Supplier Diversity Office (SDO), Prompt Payment Discount (PPD) Programs

Last change date: February 12, 2016

Contract Summary

Statewide Contract (SWC) PRF62 Designated DOER Energy Consulting Services provides a wide-ranging list of independent, experienced and pre-qualified vendors offering an array of energy and facility management consulting services under multiple categories.

Eligible Entities that use this contract may purchase services through the development of a Statement of Work (SoW) and by establishing best value evaluation criteria, followed by the use of the Request for Quote process in COMMBUYS to obtain quotes from any of the pre-qualified vendors in the appropriate category of the contract.

Contract awards are for specialized services of consultant firms qualified in one or more of the following Service Categories, including but not limited to:

1. Energy Research and Analysis Services
2. Clean Energy Systems and Technology Analysis and Research
3. Energy Programs Stakeholder Engagement Services
4. Energy Project Advisory & Consulting Services
5. Existing Building Commissioning
6. Facility Maintenance and Operations Advisory Services
7. High Performance Buildings Advisory Services

The contract may be expanded or further limited to the types of services which may be covered or required in the future. This may be done either by amendment or by "open enrollment" at any time during the term of the contract, including any extension periods when it is determined to be in the best interests of the Commonwealth.

Services Available

Including but not limited to the following service category summaries (N.B: some services are offered in more than one category). Please use this list, or refer to the scope as specified in the RFR document, in order to select the appropriate Service Category.

1. Energy Research and Analysis Services

- a. Energy Policy and Program Research & Analysis
- b. Energy Regulation Research & Design Services
- c. Energy Markets Forecasting & Analysis
- d. Utility Efficiency Program Design & Implementation
- e. Financial Analysis
- f. Staffing Research & Analysis
- g. Capital Investment & Maintenance Planning/Life Cycle Cost Analysis
- h. Energy Related Data Collection & Analysis Services

2. Clean Energy Systems and Technology Analysis and Research

- a. Renewable & Efficiency Technology Research & Analysis
- b. District Energy Systems, Energy Storage, Grid Interconnection, Demand Reduction & Microgrid Strategies
- c. Sustainable Design & Water Conservation Technology
- d. Other Clean Energy Technology Analysis/Review - Including Emerging & Innovative Technologies

3. Energy Programs Stakeholder Engagement Services

- a. Managing Public Stakeholder Processes, Training, & Education
- b. Stakeholder Engagement, Dialogue Facilitation
- c. Behavior Modification Measures or Programs
- d. Public Hearings, Outreach, Facilitation, Education
- e. Social Networking
- f. Facility Systems Training
- g. Other Training & Stakeholder Outreach

4. Energy Project Advisory & Consulting Services

- a. Energy & Water Audits, Energy Master Planning, Waste Water Planning
- b. ZNE Analysis
- c. Energy Modeling
- d. ECM Specifications & Scopes Of Work
- e. Energy Project Management Support
- f. Performance Contracting Oversight & Advisory Services
- g. Training Oversight
- h. Sub-consultant Services For Energy/Water Diagnostic Testing

5. Existing Building Commissioning (EBCx)

- a. Energy Audits & EBCx Investigations
- b. Current Facility Requirements (CFR) Documents
- c. Energy Management Systems (EMS) Evaluation
- d. ECMs: Low Cost & Low Capital Options
- e. EBCx Implementation Oversight
- f. Continuous Commissioning
- g. Sub-consultant Services For Diagnostic Testing

6. Facility Maintenance and Operations Advisory Services

- a. Facility Maintenance & Operations Advisory Services
- b. Facility Condition Assessment
- c. Facilities Training Programs
- d. Facility Operations & Management Process Improvement
- e. Staffing Research & Analysis
- f. Sub-consultant Services For Diagnostic Testing

7. High Performance Buildings Advisory Services

- a. LEED Certification Advisory Services
- b. Sustainable Design Research & Project Support for:
 - i. Passivehaus, ZeroNetEnergy, Living Building Challenge, etc.
- c. Document Production
- d. Training Support for LEED, High Performance Building Operations, Sustainable Design, and Resiliency Programs & Projects
- e. Resiliency Advisory Services

Benefits and Cost Savings

- Encourages a partnership between vendor and engaging entity for best value.
- Aggregating projects and volume can be established with vendor for common themes and best value.
- Summarizing department needs in a Statement of Work can effectively allow for prices to be negotiated based on an identified volume not known during the State bid process.
- Many SDP Plans are inclusive of subcontractors qualified to support a department for services under this contract and also allows for a department to meet their SDP annual benchmarks.
- Vendors have clients who are small and large and have a local and national presence.
- Pre-qualified vendors' business profiles are available for purchasing entities to review.
- Contract documents are located in one central location in COMMBUYS.
- Vendor Appraisal Management Form (VAMF) allows users of the contract to appraise vendors' performance on specific projects.

Who Can Use This Contract?

Applicable Procurement Law: MGL c. 7, § 22; c. 30, § 51, § 52; 801 CMR 21.00

Eligible Entities:

01. Cities, towns, districts, counties and other political subdivisions
02. Executive, Legislative and Judicial Branches, including all Departments and elected offices therein;
03. Independent public authorities, commissions and quasi-public agencies
04. Local public libraries, public school districts and charter schools;
05. Public Hospitals, owned by the Commonwealth;
06. Public institutions of high education
07. Public purchasing cooperatives;
08. Non-profit, UFR-certified organizations that are doing business with the Commonwealth;
09. Other states and territories with no prior approval by the State Purchasing Agent required; and
10. Other entities when designated in writing by the State Purchasing Agent.

Pricing and Purchase Options (All Categories)

Purchase Options: Purchases made through this contract will be direct outright purchases. All elements of the project's creation through the use of Commonwealth funds are owned by the Commonwealth except where prior ownership has been established. Commonwealth departments should be made aware of such exceptions.

Multiple Quotes Requirement:

Engagements valued at less than \$10,000 require at least one quote or an accepted Statement of Work with an estimated value. However, if the engagement value is estimated to exceed \$10,000, the Commonwealth and its Eligible Entities must solicit at least three written quotes against the appropriate PRF62 Master Blanket Purchase Order (s) in COMMBUYS.

Eligible Entities must develop a written Statement of Work and attach it to the COMMBUYS RFQ. The engagement/project will be awarded to the vendor deemed most responsive to the Statement of Work as evaluated by the awarding authority.

For projects with an estimated total price that is less than \$10,000, the Commonwealth and its Eligible Entities must ensure a sound business practice and award the contract to the responsible PRF62 pre-qualified vendor that meets the project specifications outlined in the Statement of Work (SoW). Any work awarded under this method may not subsequently add tasks that exceed the \$10,000 threshold.

It is considered best practice to seek at least three quotes for all engagements; however, multiple quotes for engagements under \$10,000 are not required to ensure price is appropriate. Quotes must be obtained for all engagements that exceed \$10,000.

Compensation Structure/Pricing & Expenses:

The compensation structure for the PRF62 contract is according to individual projects as described and agreed to in the SoW and the accepted bidder response. Awarded vendors are required to provide specific and transparent prices in all responses to bid quotation requests.

- **Project Pricing:** Costs under PRF62 must be determined through project-based compensation. Eligible Entities will determine the format in which quotations for their specific project will be collected. Vendors are expected to be competitive with each project and must provide a detailed and transparent budget related to the scope of services to be completed. Eligible Entities and awarded PRF62 vendors may negotiate project rates as part of the quote process. Negotiated project rates may be published by the Eligible Entities as part of the records in COMMBUYS.
- **Hourly Rates:** Engagements that are limited in scope, time and value might be best quoted on hourly rate compensation structure.

Invoicing:

All bills/invoices must minimally include:

- Assignment name.
- Hours billed/invoiced and Statewide Contract hourly rate or portion of project billed:
- Hourly rate: Identify account manager or other vendor agent and applicable hourly rate.
- Project based: Identify portion of project billed and balance remaining, but not an average rate.
- Supporting documents must accompany billing/invoicing received by an engaging entity.
- Totals should be reviewed for correctness by engaging entity prior to approval.
- Total billed/invoiced must meet the Commonwealth's requirements if audited.
- A description of the Supplier Diversity Activities used for this project

Negotiations: Hiring Entities are entitled and encouraged to negotiate down project rates, including ancillary services for work being conducted under this contract.

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Payments: The Hiring Entity may require work be paid in increments, as agreed upon deliverables are completed. All billing must be addressed to and with the Hiring Entities providing a breakdown of costs as required.

Additional Information

Important Facts for Buyers:

Statement of Work (SOW) Requirements: This is a solution-based contract, the type of services and scope of work, will be generated on a case-by-case basis in a sub-agreement as the SOW. Contract users are required to use the posted SOW or their department's equivalent version before starting any project with a vendor. A copy of a standard SOW can be located in the "Attachments" tab of the Master MBPO for PRF62 in COMMBUYS.

Business References: The Hiring Entity may require business references, as deemed appropriate.


How to Purchase from PRF62 MBPO through COMMBUYS

- This contract was awarded to 70 vendors and there are 70 active vendors in COMMBUYS. Each Service Category has been assigned a unique Master Blanket Purchase Order (MBPO) number as shown in the chart below:

PRF62 SERVICE CATEGORIES	MBPO Numbers
Contract Documents Master File: PRF62 Energy Consulting Services Designated DOER	PO-16-1041-ENE01-ENE01-00000006531
1. Energy Research and Analysis Services	PO-16-1041-ENE01-ENE01-00000006552
2. Clean Energy Systems and Technology Analysis and Research	PO-16-1041-ENE01-ENE01-00000006554
3. Energy Programs Stakeholder Engagement Services	PO-16-1041-ENE01-ENE01-00000006566
4. Energy Project Advisory & Consulting Services	PO-16-1041-ENE01-ENE01-00000006593
5. Existing Building Commissioning	PO-16-1041-ENE01-ENE01-00000006596
6. Facility Maintenance and Operations Advisory Services	PO-16-1041-ENE01-ENE01-00000006597
7. High Performance Buildings Advisory Services	PO-16-1041-ENE01-ENE01-00000006598

Step-by-Step User Instructions for creating a COMMBUYS Request for Quote (RFQ):

How to select a Service Category and associated Vendors for your RFQ

- Before you select a set of vendors you must know which Service Category best serve your needs. Please refer to the Service Category Scope summaries listed above.
- Go to www.commbuys.com to log in.
- Once Logged into COMMBUYS, click on the **Advanced Search** spyglass icon in upper right hand corner of the screen. 
- From the **Document Type** dropdown, select **Contract/Blankets**

- Enter “PRF62” in the **Contract/Blanket Description** and click **“Find It”**
- Select the MBPO labeled “Contract Documents: PRF62 Energy Consulting Services Designated DOER” and click on the [PO-16-1041-ENE01-ENE01-00000006531](#)
- Click on **Attachments** Tab and locate and download the Service Category Vendor Profile Document for the category you intend to use. These Profiles contain short descriptions provided by each vendor of their expertise and available services in that particular Service Category.

How to Send a Request for Quote (RFQ) through COMMBUYS

- **Once Logged into COMMBUYS, select DOCUMENTS > REQUISITIONS > NEW**
- **General Tab**
 - In the drop-down menu for **Requisition Type**, be sure to select “Release.”
 - On the right hand side, enter a Short Description of your scope of work
 - Select **Solicitation Enabled**.
 - Click on **Save and Continue**
- **Items Tab-** This Tab will allow you to search and add items from any of the seven PRF62 MBPOs; *Only one* MBPO (Service Category) however, can be used per requisition.
 - Select **Search Items** and click the “+” to open **Advance Search** fields.
 - Type “PRF62” into the **Description** field and click **“Find It”**
 - Select the appropriate MBPO
 - Add **Quantity** of 1 and **Price** of \$1.00 (If you have an estimated price, you can consider using it instead of the \$1.)
 - Click **Add to Req. & Exit**.
 - A **Distributors Tab** will have appeared; got to that tab. All vendors will appear selected as the default. You may deselect vendors if you wish.
 - Scroll to the bottom and click **“Save & Continue”**
 - Please follow the quote requirements when selecting vendors under the vendor sub tab.
- **Address Tab**
 - Enter the Bill To and Ship To address for the Purchasing Entity.
- **In the Attachment Tab**, you will need to attach the following:
 - Statement of Work.
 - Any other bid document (s) at your discretion.
- **Go to the Summary Tab**
 - Review your Solicitation Enabled Release Requisition.

- Click **Submit for Approval**.
- Click **Send**

How to convert your Release Requisition into a Bid and send it to your selected vendors for quote.

- **Locate your approved Requisition (Documents > Requisitions > Ready for Purchasing)**
- **Summary Tab**
 - The requisition will open in the **Summary Tab**; scroll to the bottom
 - Click **Convert to Bid**
- **Locate your Bid (Documents> Bids> In-progress)**
- **General Tab: Complete the following fields**
 - **Available Date** – Enter the date the Bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.
 - **Bid Opening Date** – date the Bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time.
 - **Informal Bid** – check box if you wish to view quotes as submitted (prior to the Bid Opening Date). Note: This option should only be used for closed bids to vendors on contract. Refer to policy for further clarification.
 - Purchase Method:-Option should default to Open Market. If not then select Open Market from the drop down menu
 - Click **Save and Continue**
- **Review information on Items, Address, and Attachment Tabs (all data should have been brought over from the requisition)**
- **Bidders Tab**
 - There is no **Vendor tab** on the Bid. All Vendors entered on the requisition are now listed as **Bidders**.
 - **Restricted Bid** – if not already done, click the radio button next to **Restricted Bid**, to ensure that only selected vendors can view and respond.
 - **Prices** – if you want vendors to see your price, select the **Show Unit Prices to Vendors** checkbox at the bottom of the page.
 - **Hide Bid Holder List on Vendor Side** – this checkbox may already be checked. This hides the Vendor list from all responding Vendors. Uncheck if desired.
 - **Additional Bidders:** To add more Bidders, click **Lookup & Add Vendors** button.
 - If you made any changes, click **Save & Continue**.
- **Q&A Tab**

- To dialogue with vendors, select the **Allow vendor to submit questions** checkbox.
- If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
- If you wish to display the dialogue on the Web, select the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.
- If you made any changes, click **Save & Continue**.
- **Summary Tab**
 - Review the bid information.
 - Scroll to the bottom of the page and click the **Submit for Approval** button.
 - A pop up message appears asking if you want to submit this bid.
 - Click **OK**
 - Once the bid is approved, return to the **Summary tab** and scroll to the bottom of the page and click the **Send Bid** button.
 - This will notify any vendor listed on the bid and post it on COMMBUYS allowing the selected vendors to search for it and submit quotes.

Bid management and award

- For information on how to manage your Bid, review bid submissions, and make an award, please see the [Job Aids for Buyers](#) on the COMMBUYS website labelled [How to Score and Award a Bid in COMMBUYS](#)

How to locate Distributor Model Master Blanket Purchase Orders (MBPOs) when not logged into COMMBUYS:

Navigate to www.COMMBUYS.com

- Click on **Contract and Bid Search**
- Select "Contract/ Blankets."
- Type in "PRF62" in the "Contract/ Blankets Description" search field to find the distributor model Master Blanket Purchase Orders (MBPOs) for the Service Categories listed above.

If you need assistance with COMMBUYS contact the COMMBUYS Help Desk at: COMMBUYS@state.ma.us or 1-888-627-8283 or 617-720-3197 during normal business hours (8am - 5pm ET Monday - Friday)

Strategic Sourcing Team Members

Name	Organization
Charles Tuttle	DOER
Eric Friedman	DOER
Stephen A. White	DOER
Stephen P. White	DCAMM
Jenna Ide	DCAMM
Sorraia Tavares	OSD